



**CITY OF SAN DIEGO  
EMPLOYMENT OPPORTUNITY**

Page 1 of 2

**#T2740 RETIREMENT FINANCIAL SPECIALIST TRAINEE  
MONTHLY SALARY: \$3240 to \$3908**

**#T2741 RETIREMENT FINANCIAL SPECIALIST I  
MONTHLY SALARY: \$3719 to \$4520**

**#T2742 RETIREMENT FINANCIAL SPECIALIST II  
MONTHLY SALARY: \$4520 to \$5463**

**APPLICATION FILING PERIOD: FIRST DATE: June 29, 2007**

**LAST DATE: August 1, 2007**

Applications received later than 5:00 p.m. on the last date to apply will be rejected. Please apply promptly since vacancies may be filled as soon as a sufficient number of applicants has been processed. Persons may apply only once during this application filing period. Future application filing periods may be announced.

**HOW TO APPLY:** You must complete a **STANDARD EMPLOYMENT APPLICATION** for this position by responding to **all** questions and submitting the completed application to the City of San Diego Personnel Department. You may complete/submit a hard copy (paper) application **or** an online application via the internet. Please read the following instructions for each method of submission.

**HARD COPY (Paper Submission)**

1. You must also submit a completed DATA ENTRY FORM.
2. To show proof of any required degrees, certificates, licenses, etc. you must attach a copy of the documents to your application.

**ONLINE (Internet Submission)**

1. Do **NOT** complete /submit a Data Entry Form. The information will be automatically added to your file.
2. To show proof of any required degrees, certificates, licenses, etc. you must submit a copy of the documents in person **or** FAX / MAIL them to the Personnel Department **with the cover sheet** provided during your online session. Follow the instructions on the cover sheet.

**\*SUPPLEMENTAL QUESTIONS** – In Section 4 of the Standard Employment Application, you **MUST** respond to the following numbered questions or your **application will be rejected**. Read the directions on the application form carefully and be sure to follow all instructions.

- \*1. Specify the exam number and the title of the positions listed below that you are applying for. Only the positions you indicate will be automatically added to your file.
  - #T2740 Retirement Financial Specialist Trainee
  - #T2741 Retirement Financial Specialist I
  - #T2742 Retirement Financial Specialist II
2. Describe your professional accounting experience. Indicate at which employer (A, B, C, etc.) these duties were performed.
3. Describe your professional retirement financial administration experience. Indicate at which employer (A, B, C, etc.) these duties were performed.

**REQUIREMENTS:** For each position, you must meet the requirement(s) listed below on the date you apply, unless otherwise indicated.

**RETIREMENT FINANCIAL SPECIALIST TRAINEE:** College graduation with a Bachelor's Degree in Accounting or Business Administration.

**#T2740 RETIREMENT FINANCIAL SPECIALIST TRAINEE**

**#T2741 RETIREMENT FINANCIAL SPECIALIST I**

**#T2742 RETIREMENT FINANCIAL SPECIALIST II**

**Page 2 of 2**

**RETIREMENT FINANCIAL SPECIALIST I:** College graduation with a Bachelor's Degree in Accounting or Business Administration and one year of full-time professional accounting or retirement financial administration experience.

**RETIREMENT FINANCIAL SPECIALIST II:** College graduation with a Bachelor's Degree in Accounting or Business Administration and two years of full-time professional accounting or retirement financial administration experience.

**NOTES:**

1. **Proof of degree must be submitted at time of application.**
2. Qualifying retirement financial administration experience may be with a public or private retirement system performing a substantial part of the duties listed below.
3. If you do not meet the educational requirements, you may substitute additional qualifying professional accounting or retirement financial administration experience on a year-for-year basis.
4. If you do not meet the experience requirements, a Master's degree in Accountancy or Business Administration or successful completion of all parts of the written test for the CPA certificate may be substituted for a MAXIMUM of one year of the required experience. **You must submit proof of degree or successful completion of the CPA written test with your application.**

**DUTIES:**

**Retirement Financial Specialist Trainees** perform accounting and financial reporting duties; assist in the analysis & reconciliation of investment activity for the San Diego City Employees Retirement System Trust Fund (SDCERS); assist in the research & analysis of projections; assist in the preparation of financial reports for review by the Retirement Board; assist in the reconciliation of data input and financial report output from automated systems; and assist in the preparation of special research reports and studies as needed.

**Retirement Financial Specialists I & II** perform progressively complex accounting and financial reporting duties; verify, analyze & reconcile investment activity for the SDCERS Trust Fund; research & analyze projections; assist in performing market price & dividend history updates; assist in preparing financial reports for review by the Retirement Board; reconcile data input and financial report output from automated systems; assist with preparation & proofing of SDCERS comprehensive annual financial report; and prepare special research reports and studies as needed.

**THE SCREENING PROCESS** will consist of a comprehensive evaluation of the **Standard Employment Application** for applicable education, experience, and/or training. Only those applicants whose qualifications most closely relate to the position requirements will be placed on the eligible list.

**ELIGIBLE LIST:** Separate eligible lists will be established for **Retirement Financial Specialist Trainee, Retirement Financial Specialist I, and Retirement Financial Specialist II.** Candidates who are successful in the screening process described above will be placed on the respective **one category** eligible list(s) which will be used to fill position vacancies during the next **one year**. For each vacancy, only those candidates with the most appropriate qualifications from the corresponding list will be contacted by the hiring department for an interview.

**PRE-EMPLOYMENT REQUIREMENTS:** Any employment offer is **conditional** pending the results of all pre-employment screening processes required for the job, which may include but are not limited to the following: confirmation of citizenship/legal right to work in the United States; completion of a pre-employment medical review/exam (which may include drug/alcohol testing); reference checks; and a fingerprint check. The fingerprints will be submitted to the California Department of Justice for a conviction record report. All of these processes must be successfully completed before employment begins. **Note:** Misrepresentation, falsification, or omission of pertinent facts in any step of the screening/selection process may be cause for disqualification or termination of employment.

KIM/June 29, 2007/Management Trainee (*Option Title: Retirement Financial Specialist Trainee*)/\*Rev. 1 (07-10-07)/  
Assistant/Associate Management Analyst (*Option Titles: Retirement Financial Specialist I & II*)/Class 1108B; 1132J; 1218Q

---

**THE CITY OF SAN DIEGO PERSONNEL DEPARTMENT • "WORKING HARD TO KEEP SAN DIEGO WORKING"**

The City of San Diego has an active Equal Opportunity Program and vigorously supports workplace diversity. Applicants with disabilities who require testing accommodations may call (619) 236-6358. To obtain this information in alternative formats, persons with disabilities may call (619) 236-6467 or for TT (619) 236-6776.

# APPLICANT INFORMATION

---

## APPLICATION INFORMATION

Application materials must be received at the Employment Information Center NO LATER THAN 5:00 P.M. ON THE FINAL FILING DATE. Postmarks as proof of meeting the final filing date are not accepted. If you are returning your application via the U.S. Postal Service, you should use "Certified Mail-Return Receipt Requested" to provide verification of timely delivery. Do not send applications via interoffice mail.

1. Starting salaries will be determined by the hiring department.
2. The hiring department with a vacancy will contact and interview eligible candidates as needed. All candidates may not be contacted. The final selection and offer of employment is made by the hiring department, not the Personnel Department.
3. Unless otherwise stated, relevant experience may be substituted for education.
4. Eligible lists may be used on a periodic basis. As such, lists may not be used for several months. Eligible lists may be extended by the Civil Service Commission.
5. Examination requirements and processes may be revised.
6. Experience, education, and all other information provided by an applicant orally or in writing are subject to verification.

---

**FALSIFICATION:** Any misrepresentations or false statements during or after the employment process may be cause for disqualification or dismissal from employment.

---

## GENERAL REQUIREMENTS

Requirements must be met at time of application unless otherwise stated.

The minimum age for most full-time employment is 18, unless you are 17 and a high school graduate. You must have the legal right to work in the U.S. or have U.S. citizenship. Persons hired must present acceptable proof of identity and the legal right to work in the United States and the authenticity of the documents must be verified before starting work. After hire, you will be required to sign a loyalty oath and may be required to live in San Diego County.

**A CITY MEDICAL EXAMINATION** including drug screening and documentation of medical history may be conducted following a conditional offer of employment or promotion. Medical condition must enable the applicant to perform the essential duties of the position.

The City of San Diego is committed to a drug and alcohol free workplace.

THE CITY OF SAN DIEGO SUPPORTS WORKPLACE DIVERSITY and does not discriminate on the basis of race, sex, age, ancestry, national origin, political/religious affiliation, sexual orientation, AIDS or HIV status, cancer, or non-job related physical/mental disability. The City is committed to making its jobs, programs, and services accessible to all persons and complies with all ADA non-discrimination requirements in its employment practices.

---

**A CONVICTION RECORD FORM must be submitted before hire. On it you must list all criminal convictions** you have had. A criminal record is not necessarily a basis for disqualification from City employment. Each applicant's conviction record will be evaluated on a case by case basis considering the type and seriousness of the crime, how much time has elapsed, and the nature of the job.

---

## EMPLOYEE BENEFITS

City Employees may be eligible to participate in a benefit program including holidays, vacations, savings and retirement plans, health programs, and other benefits.

Benefits may change due to employer-employee contract negotiations.

## REQUIREMENTS FOR PROMOTIONAL EXAMINATIONS

1. Current City employment, or currently on a Re-employment List or Leave of Absence.
2. Six months of continuous City employment in the Classified Service immediately prior to the application closing date or, if no closing date is specified, by date of application filing (exceptions: Persons recently hired from Re-employment Lists, and employees in the Unclassified Service if the employee has six months in the Classified Service with no break in service, prior to becoming an Unclassified employee).
3. Most recent performance evaluation in your current City classification must be other than "Unsatisfactory".

---

**The provisions of this bulletin do not constitute an expressed or implied contract.**

---

**DIVERSITY BRINGS US ALL TOGETHER**